

Appendix C: Surveys

- C-1 Online Survey**
- C-2 Combined Group Survey**
- C-3 Control Group Survey**

ReadyReturn Online User Survey



Thank you for using ReadyReturn to file your 2004 California income tax return. We value your opinion and hope that you will take a few minutes to complete this survey. Your participation in this survey will help us evaluate the ReadyReturn pilot program and measure taxpayer interest in using this service in the future.

Please respond to the following statements regarding your experience using ReadyReturn:

- | 1. ReadyReturn: | Yes | No | No Opinion |
|----------------------------------------------------------|-----------------------|-----------------------|-----------------------|
| a. was easy to understand. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| b. made me feel less anxious about filing my tax return. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| c. kept my personal information secure. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| d. is the type of service the government should provide. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

- | 2. Compared to how I filed my tax return last year: | Yes | No | No Opinion |
|-----------------------------------------------------|-----------------------|-----------------------|-----------------------|
| a. I saved time using ReadyReturn. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| b. I saved money using ReadyReturn. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| c. ReadyReturn was more convenient. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

3. Would you use ReadyReturn again next year?

- ☐ Yes
☐ No
☐ No Opinion

4. Please rate your overall satisfaction with ReadyReturn?

- ☐ Very satisfied
☐ Satisfied
☐ Dissatisfied
☐ Very dissatisfied
☐ No Opinion

5. How long did it take you to complete and file your return using ReadyReturn?

hour(s) minutes

6. How much money did you spend to complete and file your return using ReadyReturn (include any money you spent on tax preparation, software, etc?)

\$

7. What were the main reasons you chose to use ReadyReturn? (CHECK ALL THAT APPLY)

- ☐ I was invited to participate in the pilot project.
- ☐ It was easier than how I filed last year.
- ☐ I thought it would save me time.
- ☐ I thought it would save me money.
- ☐ I could get a faster refund.
- ☐ TeleFile is no longer available.
- ☐ Other, please specify

8. Did having the ReadyReturn invitational letter available in Spanish make it easier to file your tax return?

- ☐ Yes
- ☐ No
- ☐ Not applicable

9. Would you like information to be available in a language other than English?

- ☐ Yes, please specify what language
- ☐ No
- ☐ Not applicable

10. If this is the first time you e-filed your return, what are the main reasons you have not tried e-file before? (CHECK ALL THAT APPLY)

- ☐ Not applicable; I have e-filed my return in the past.
- ☐ It costs too much.
- ☐ I didn't have access to the Internet.
- ☐ I have security concerns about e-filing.
- ☐ I have always filed a paper return.
- ☐ My preparer didn't offer it.
- ☐ It's too complicated.
- ☐ Other, please specify

11. In general, how do you prefer to prepare your tax return?

- ☐ Complete my own paper return.
- ☐ Use a government Website.
- ☐ Use a non-government Website or software.
- ☐ Use a tax preparer/accountant.
- ☐ Other, please specify

12. In general, how do you prefer to file your tax return?

- ☐ Mail it.
- ☐ e-file it.
- ☐ Other, please specify

13. The State of California receives your wage and withholding information from your employer(s). How important is it to you to have access to this information?

- ☐ Very important
- ☐ Somewhat important
- ☐ Not very important
- ☐ Not at all important
- ☐ No opinion

14. How would you prefer to access your wage and withholding information?

- ☐ Online using the Franchise Tax Board's Website
- ☐ Online using tax preparation software
- ☐ Through a tax preparer/accountant
- ☐ Other, please specify
- ☐ No opinion

15. If you have any additional comments, please provide them in the space below:

Submit

Clear and Start Again

Last Modified Date: 03/22/2005



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FRANCHISE TAX BOARD
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Telephone (916) 845-7979 Fax (916) 843-0728

STEVE WESTLY
Chair
JOHN CHIANG
Member
TOM CAMPBELL
Member



May 2, 2005

Earlier this year we invited you to participate in the ReadyReturn pilot program. We have now randomly selected you to share your opinions so we can learn what you thought of this pilot.

The following survey is **voluntary**, but your input will **help us** evaluate the ReadyReturn pilot program, measure taxpayer interest in using this new service, and determine if we should offer ReadyReturn to more taxpayers.

You may complete this survey even if you did not use ReadyReturn to file your 2004 California personal income tax return. For the results to be truly representative, it is important that you complete and return the survey.

Please be assured that we keep all information you provide strictly confidential. Your name will never be connected with your answers in any way.

Once you have completed the survey, return it to us using the enclosed self-addressed postage-paid envelope. If you have any questions or need help completing the survey, contact Christie Svoboda of the Stakeholder Value Research Unit by phone (916) 845-7979 or by email ReadyReturnSurvey@ftb.ca.gov.

Thank you for your time and participation. Your prompt reply is appreciated.

Sincerely,

Christie Svoboda
Research Analyst

/cb



FRANCHISE TAX BOARD
ReadyReturn Survey



1. How did you prepare your 2004 California personal income tax return?
- ☐ I have not prepared my 2004 return yet.
- ☐ Used ReadyReturn.
- ☐ Completed my own paper return.
- ☐ Used the Franchise Tax Board's CalFile.
- ☐ Used a non-government tax preparation Website or software.
- ☐ Used a tax preparer/accountant.
- ☐ Other (Please specify: _____)
2. How did you file your 2004 California personal income tax return?
- ☐ I have not filed my 2004 return.
- ☐ I mailed my return.
- ☐ I e-filed my return.
- ☐ Other (Please specify: _____)

If you used ReadyReturn, go to question 3.

If you did not use ReadyReturn, go to question 9.

If you have not prepared or filed your return yet, go to question 13.

3. Please respond to the following statements regarding your experience using ReadyReturn:

ReadyReturn:

- | | Yes | No | No Opinion |
|----------------------------------------------------------|--------------------------|--------------------------|--------------------------|
| a. was easy to understand. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| b. made me feel less anxious about filing my tax return. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| c. kept my personal information secure. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| d. is the type of service the government should provide. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Compared to how I filed my tax return last year:

- | | Yes | No | No Opinion |
|-------------------------------------|--------------------------|--------------------------|--------------------------|
| e. I saved time using ReadyReturn. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| f. I saved money using ReadyReturn. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| g. ReadyReturn was more convenient. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

4. Would you use ReadyReturn again next year?
- ☐ Yes
- ☐ No
- ☐ No Opinion
5. Please rate your overall satisfaction with ReadyReturn?
- ☐ Very Satisfied
- ☐ Satisfied
- ☐ Dissatisfied
- ☐ Very Dissatisfied
- ☐ No Opinion

FRANCHISE TAX BOARD
ReadyReturn Survey

6. What were the main reasons you chose to use ReadyReturn? **(CHECK ALL THAT APPLY)**

- ☐ I was invited to participate in the pilot project.
- ☐ It was easier than how I filed last year.
- ☐ I thought it would save me time.
- ☐ I thought it would save me money.
- ☐ I could get a faster refund.
- ☐ TeleFile is no longer available.
- ☐ Other (Please specify: _____)

7. Did having the ReadyReturn invitational letter available in Spanish make it easier to file your tax return?

- ☐ Yes
- ☐ No
- ☐ Not applicable (i.e., I do not read Spanish.)

8. Would you like information to be available in a language other than English?

- ☐ Yes (Please specify what language: _____)
- ☐ No
- ☐ Not applicable

If you used ReadyReturn, go to question 11.

If you did not use ReadyReturn, go to question 9.

If you have not prepared or filed your return yet, go to question 13.

9. What were the main reasons you didn't participate in the ReadyReturn pilot program?
(CHECK ALL THAT APPLY)

- ☐ I needed to file my federal tax return first.
- ☐ I had to make more changes than the ReadyReturn Website allowed.
- ☐ It was too confusing.
- ☐ I prefer to use a tax preparer/accountant.
- ☐ I prefer to use a non-government e-file company.
- ☐ I don't think filing returns using the Internet is secure.
- ☐ I didn't feel comfortable receiving a return completed by the government.
- ☐ I didn't have time.
- ☐ I need the information in another language.
(Please specify what language: _____)
- ☐ Other (Please specify: _____)

10. How did you use the ReadyReturn we sent you? **(CHECK ALL THAT APPLY)**

- ☐ I used it to double-check my figures.
- ☐ I used it to complete my return myself.
- ☐ I gave it to my tax return preparer/accountant.
- ☐ I did not use it.
- ☐ Other (Please specify: _____)

FRANCHISE TAX BOARD
ReadyReturn Survey

11. How long did it take you to complete and file your 2004 California personal income tax return?
_____ hours _____ minutes

12. How much money did you spend to complete and file your 2004 California personal income tax return (include any money you spent on tax preparation, software, etc.)?
\$_____

13. In general, how do you prefer to prepare your tax return?

- ☐ Complete my own paper return.
- ☐ Use a government Website.
- ☐ Use a non-government Website or software.
- ☐ Use a tax preparer/accountant.
- ☐ Other (Please specify: _____)

14. In general, how do you prefer to file your tax return?

- ☐ Mail it.
- ☐ e-file it.
- ☐ Other (Please specify: _____)

15. The State of California receives your wage and withholding information from your employers.
How important is it to you to have access to this information?

- ☐ Very important
- ☐ Somewhat important
- ☐ Not very important
- ☐ Not at all important
- ☐ No opinion

16. How would you prefer to access your wage and withholding information?

- ☐ Online using the Franchise Tax Board's Website
- ☐ Online using tax preparation software
- ☐ Through a tax preparer/accountant
- ☐ Other (Please specify: _____)
- ☐ No opinion

17. If you have any additional comments, please provide them in the space below:

Thank you for taking the time to complete this survey!
If you have any questions, please contact the Stakeholder Value Research Unit at (916) 845-7979.



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STEVE WESTLY
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May 3, 2005

In early 2005, we launched a pilot program called ReadyReturn. As part of this program, we selected taxpayers from around the state and provided them with a completed 2004 California personal income tax return using information we already have from their W-2s.

Although we did not randomly select you to participate in the pilot program, we have selected you to participate in this survey. We would like a few minutes of your time so you may give us your **opinions about the ReadyReturn concept and filing taxes in general**.

For the results to be truly representative, it is important that everyone complete and return the survey. Please be assured that we keep all information you provide strictly confidential. Your name will never be connected with your answers in any way.

Once you have completed the survey, return it to us using the enclosed self-addressed postage-paid envelope. If you have any questions or need help completing the survey, contact Christie Svoboda of the Stakeholder Value Research Unit by phone (916) 845-7979 or by email ReadyReturnSurvey@ftb.ca.gov.

Thank you for your time and participation. Your prompt reply is appreciated.

Sincerely,

Christie Svoboda
Research Analyst

/cg



FRANCHISE TAX BOARD
Taxpayer Survey

1. How did you prepare your 2004 California personal income tax return? (SELECT ONE)

- ☐ Completed my own paper return.
☐ Used Franchise Tax Board's CalFile.
☐ Used a non-government Website or software.
☐ Used a tax preparer/accountant.
☐ Other (Please specify: _____)
☐ I have not prepared my return yet. (**PLEASE SKIP TO QUESTION 5**)

2. How did you file your 2004 California personal income tax return? (SELECT ONE)

- ☐ I mailed it.
☐ I e-filed it.
☐ Other, please specify _____
☐ I have not filed my return yet. (**PLEASE SKIP TO QUESTION 5**)

3. How long did it take you to complete and file your 2004 California personal income tax return?

_____ hours _____ minutes

4. How much money did you spend to complete and file your 2004 California personal income tax return (include any money you spent on tax preparation, software, etc.)?

\$ _____

5. ReadyReturn is a new service the State of California offered to some taxpayers this year. Please respond to the following statements based upon the description of ReadyReturn. A completed tax return is mailed to you from the Franchise Tax Board. The return is pre-filled using wage information sent to the State from your employer(s). You can verify the return, sign it and mail it or you can go online to make necessary changes and e-file the return.

- | | Yes | No | No Opinion |
|-----------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|
| a. I would be interested in using this service. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| b. This service would make me feel less anxious about filing my tax return. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| c. This is the type of service the government should provide. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

6. In general, how do you prefer to prepare your tax return? (SELECT ONE)

- ☐ Complete my own paper return.
☐ Use a government Website.
☐ Use a non-government Website or software.
☐ Use a tax preparer/accountant.
☐ Other (Please specify: _____)

7. In general, how do you prefer to file your tax return? (SELECT ONE)

- ☐ Mail it.
☐ e-file it.
☐ Other (Please specify: _____)

8. The State of California receives your wage and withholding information from your employers. How important is it to you to have access to this information?

- ☐ Very important
- ☐ Somewhat Important
- ☐ Not very important
- ☐ Not at all important
- ☐ No opinion

9. How would you prefer to access your wage and withholding information?

- ☐ Online using the Franchise Tax Board's Website
- ☐ Online using tax preparation software
- ☐ Through a tax preparer/accountant
- ☐ Other (Please specify: _____)
- ☐ No opinion

10. If you have any additional comments, please provide them in the space below:

Thank you for taking the time to complete this survey!

If you have any questions, please contact the Stakeholder Value Research Unit at (916) 845-7979.